
TO: Practice Managers and Leaders

FROM: Legal Department

DATE: 2/21/2025

SUBJECT: Litigation-Related Requests – HEAT Ticket

Beginning on **Monday, February 24th**, the following litigation-related requests will need to be entered as a HEAT ticket:

- Subpoenas*
- Depositions
- Interrogatories/ Questionnaire Request
- DEA / BNDD / Board of Healing Arts (BOHA) / Attorney General Complaints
- Employment Records
- Certificate of Insurance Coverage (COI) / Verification of Coverage

It will be the same process you used for your Formstack entries. You will still go to: Intranet > Service Requests > Legal Requests > and then choose from the selections listed above. Click the hyperlink on the selection needed and it will direct you to answer questions and submit documents via our HEAT ticket system.

Do not enter any Protected Health Information (PHI) into the HEAT ticket system. If you have any questions as to whether your request contains PHI, please reach out to legal@sfmc.net.

*As a reminder, if you receive or are served a subpoena that includes a request for medical records, this can be sent directly to ROI@sfmc.net for processing and tracking.

Please reach out to Danielle Barrett (ext. 3489 or dbarrett@sfmc.net) with any questions.